

EXTRA Credit Union
Structured Compensation - Job Description
Training Specialist

Data Year: 2022

Prepared On: 10/03/2022

Department:	None	Grade:	8
Reports To:	Human Resource Manager	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:	DMW	Effective Date:	08/04/2017
		Revised Date:	08/08/2017

Role:

To improve overall employee effectiveness/performance through the application of individual and group training techniques and programs, consistent with the Credit Union's organizational priorities and strategic plans, with a heavy emphasis on a sales and service training and education.

Essential Functions & Responsibilities:

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| N | 40% | Conducts new employee orientation sessions and on-the-job training, including use of computers and software; conducts training in marketing techniques, health and safety practices, and refresher and upgrading training. |
| N | 15% | Formulates training outline and determines instructional methods, utilizing individual training, group instructions, demonstrations, and workshops; selects or develops training aids such as handbooks, visual aids, and tutorials. |
| N | 15% | Evaluates and assists in designing training manuals and related materials, training classes, and training procedures. |
| N | 15% | Works with Team to create established course curriculum to career path employees. |
| N | 10% | Tracks the progress of trainees through routine tests, observation, and feedback from supervisors; evaluates the effectiveness of the current training. |
| N | 5% | Performs other related duties as required. |

Performance Measurements:

1. To achieve a 90% or better score from employee testing following completion of all formal employee training programs, and an 80% or better retention rating (re-test) 30 days following the training.
2. To meet all training objectives and goals established for the year.
3. To maintain a basic understanding of Credit Union products, services, policies and procedures, as well as an understanding of the Credit Union's mission.
4. To maintain a professional, courteous, and friendly atmosphere for members and coworkers.
5. To relate any problems in training effectiveness to the supervisor, making recommendations to resolve them.
6. To provide friendly, professional and accurate service and support to all members and associates.
7. Assists and supports Executives/Management in the maintenance of the Sales and Service culture and Lender Development Program (LDP)
8. Adheres to the credit unions sales and service standards.
9. Passes the Product and Service Knowledge Assessment on an annual basis with a passing score.

Knowledge and Skills:

Experience	Two years or more of similar or related experience.
Education	A two-year college degree or completion of a specialized course of study at a business or trade school.
Interpersonal Skills	Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.
Other Skills	<ol style="list-style-type: none"> 1. Must possess excellent communication skills. 2. Must be above-average with computer software in a windows environment, in addition to being able to operate other devices and programs to deliver training by various communication channels. 3. Must be professional in appearance, dress, and attitude.
Physical Requirements	This job requires using hands and fingers to keyboard for data entry into a computer, which may include repetitive motions. Ordinary visual acuity is needed to prepare and revise documents. Average hearing ability is necessary to receive detailed information verbally. This job is mainly sedentary and may require the candidate to exert up to 20 lbs. of force occasionally.
Work Environment	No hazardous or significantly unpleasant conditions exist, such as in a typical office.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

Printed Employee Name

Date

Employee Signature